



JOHNSTONE SUPPLY TRAINING AGENDA:  
May 26 – June 13, 2025

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## **Updated Week 2: QuickBooks Online (QBO) Essentials**

### **Day 6: Getting Started with QBO**

- Difference between QBO plans
- Creating and customizing your QBO account
- Navigating the dashboard and settings

### **Day 7: Chart of Accounts & Banking**

- Setting up the Chart of Accounts in QBO
- Connecting bank accounts and credit cards
- Categorizing and matching transactions using bank feeds

### **Day 8: Sales: Customers & Invoicing**

- Creating customers and sales receipts
- Creating and sending invoices Setting up recurring transactions and payment reminders

### **Day 9: Expenses: Vendors & Bills**

- Entering bills and expenses
- Managing vendor profiles
- Scheduling bill payments and using the "Pay Bills" tool

### **Day 10: QBO Reports & End-of-Week Project**

- Running and customizing reports: P&L, Balance Sheet, A/R Aging
  - Using the Reports center
  - Hands-on mini project: Create a full transaction workflow in QBO
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